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# Prototype Reflective Supervision Policy

## Introduction

This Prototype Supervision Policy provides a framework for piloting reflective supervision in the UMC. These pilot projects are intended as time-limited opportunities to experience reflective supervision in order to assist the General Board of Higher Education & Ministry (GBHEM) in evaluating its impact and potential uses. The intention is to refine this Prototype Policy in light of these pilot projects in order to make reflective supervision more widely available within the UMC as part of an integrated strategy for clergy excellence and congregational health.

In the Church's connectional structure, bishops and superintendents must provide oversight for many people but are not able to accompany each clergy person in all the necessary formative, normative, and restorative aspects of clergy leadership development and ministerial practice.

Delegating reflective supervision to specially trained supervisors has been demonstrated to

- reduce clergy anxiety
- facilitate early interventions in situations of risk
- help clergy embed new ways of working and find ways forward in complex and demanding situations

## 1 Structure

### 1.1 What is reflective supervision?

1.1.1 Reflective supervision is a specific practice that contributes to the overall task of holding the Church together and to Christ. It involves those engaged in ministry meeting regularly with a trained and approved supervisor to reflect on the supervisee's vocation and practice. (Leach 2020)

1.1.2 In the UMC the word supervision has various meanings and usages. It is often used to describe the ministry of those with oversight responsibility of the Church and the ministries of others. While oversight/supervision involves setting missional direction, being a focus for unity and upholding the discipline of the Church, reflective supervision contributes to oversight/supervision through giving regular time and intentional space to ministers and other practitioners to help them explore their vocation and work. These meetings are focused upon helping the supervisee to exercise the grace of

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ministry responsibly within the context of the mission and discipline of the Church and to help them to be effective, resilient, and accountable to those appointed to oversee their work.

1.1.3 In reflective supervision the prime task of supervisor and supervisee together is to hold open a space for hearing what God is saying to the supervisee as the two reflect upon the supervisee's vocation and practice. In this process, the reflective supervisors put themselves at the disposal of reflective supervisees for the sake of their wellbeing, growth, and responsible practice. In this sense reflective supervision might be thought of as a means of grace in which God is encountered as two people commit to work together in a regular, structured, and covenanted process. Its covenanted character enables trust building through maintaining clear boundaries, role clarity, and clear lines of reporting.

### 1.2 Aims and integrated functions of reflective supervision

#### 1.2.1 Aims:

- support supervisees in their vocational development and effective practice
- safeguard the interests of those amongst whom ministry is practiced, including those of children and vulnerable adults
- ensure that ministry offered in the name of The United Methodist Church is collegially and accountably reflected upon in the light of God's mission and the purposes of The United Methodist Church

#### 1.2.2 Integrated functions:

- Normative
  - share theological reflection on the practices and vocation of ministry within the horizon of God's mission, agreed understandings of the qualities of transformative clergy leadership, and local/conference mission priorities
  - monitor and maintain risk, role clarity, appropriate boundaries, and ethical working within the discipline of The United Methodist Church
- Formative
  - support lifelong learning, formation, and development in ministry and the identification of training needs;
  - explore creative approaches to demanding issues of ministry and relationships as they arise.
- Restorative
  - ensure that the supervisee's vocation and work is shared, valued, and nurtured



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- ensure that the supervisee's health and wellbeing issues are identified and addressed

### 1.3 Form and structure of reflective supervision meetings

#### 1.3.1 Each supervision meeting should provide opportunity for:

- an update on agreed actions from previous supervisory meetings
- an opportunity for supervisees to survey their work and name any significant developments, causes for celebration, sources of concern, risks that need attention, or personal issues that are affecting their work
- the exploration in detail of at least one significant practice issue
- the recording of explicit actions in relation to risk management, wellbeing, fitness to practice, and any other matter for referral

#### 1.3.2 In order to be effective, reflective supervision needs to be structured and intentional and evidence the following processes as spelled out by Leach and Paterson (2015, p.38).

- **Hosting and containing** in which the supervisee is welcomed and space is made to be attentive to God's presence and leading.
- **Focusing and eliciting** in which the supervisor and the supervisee work together to identify the heart of the matter to be explored and the intended aim in doing so.
- **Exploring and imagining** in which the supervisor and the supervisee reflect together on the aims, impacts, dynamics and strategies of the practice under discussion using a variety of tools and perspectives.
- **Bridging and enacting** in which the supervisor helps the supervisee to identify their next steps, the resources needed for implementation, and gives opportunity for the supervisee to rehearse future conversations if needed.
- **Tracking and monitoring** in which the supervisor pays attention to whether or not the supervision is meeting the restorative and formative needs of the supervisee in the light of the Church's normative frameworks of belief and discipline and its missional purposes.
- **Reviewing and closing** in which the supervisee has opportunity to name what they are taking away from the meeting; the supervisor has opportunity to name any issues that cannot be left, the work and the supervisee are commended to God in prayer, and the administrative tasks are carried out.



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- 1.3.3 Over time a series of supervisions should provide for rounded attention to the whole ministry practice of the supervisee. For clergy, for example, this might be in terms of GBHEM's qualities of transformative clergy leaders:
- **INSPIRED**
    - the vocational identity of the minister and their engagement in the life of discipleship
    - the health, resilience, and wellbeing of the minister
  - **CONNECTED**
    - the minister's approach in relationships within and beyond the appointment setting
    - the minister's use of power and their sensitivity to issues of equality and diversity.
  - **AGILE**
    - the minister's growing edge and learning needs
    - the minister's ability to lead creatively through change and conflict
  - **ROOTED**
    - the minister's understanding of and ability to communicate the Christian faith as the UMC has received it
    - the minister's ability to root others in the Christian faith and help them to live it out.
    - the minister's ability to root others in the Christian faith and help them to live it out.
- 1.4 Who supervises whom?**
- 1.4.1 Reflective supervision may be offered either by ministers in oversight who are trained and approved under the Policy, or by others similarly trained and approved – lay or ordained – whom those in oversight have nominated to undertake this work.
- 1.4.2 It is the prerogative of the minister in oversight, in consultation with any specialist staff, the supervisor and supervisee concerned, to approve the allocation of supervisors/supervisees and any changes to supervisory relationships.
- 1.4.3 Reflective supervision benefits clergy and those in licensed lay ministries. It is also useful for in the support and accountability of those who hold roles with significant relational dimensions in which their personal impact upon the work, or the work's



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personal impact upon them would benefit from regular exploration, including those who:

- hold significant public representative roles,
- have significant pastoral contact,
- bear responsibilities in which there are significant risks to them, those amongst whom they work or the health of the Church,
- are engaged in supervising others, e.g. as coaches, counsellors, mentors, spiritual directors and reflective supervisors.

### 1.5 Boundaries of Reflective Supervision

- 1.5.1 Reflective supervision is not private, but it has a bounded confidentiality for the purpose of accountability.
- 1.5.2 An Agreed Record of each supervisory meeting is made between the supervisor and the supervisee and is kept in a password protected participant file by the supervisor.
- 1.5.3 Where reflective supervision is delegated: Agreed Records are shared with overseeing ministers so they can monitor the issues brought and ensure that any issues of concern are addressed.
- 1.5.4 Where offered by minister in oversight: Agreed Records are shared with an agreed upon third party, such as the supervisor of the overseeing minister, who can help the supervisor reflect on their supervisory work.
- 1.5.5 Issues for exploration in supervision should normally be raised by the supervisee. The supervisor may raise issues of concern arising from patterns they observe in the work presented by the supervisee, or request that the supervisee focus in a particular area. Ministers with oversight responsibilities (e.g. bishops, district superintendents, senior pastors, or line managers) may bring issues to the attention of supervisees for them to take to a supervision session. However, if the minister in oversight is offering reflective supervision, care needs to be taken to retain the reflective character of the supervisory space. If the supervisee does not bring to supervision the issue recommended by their minister in oversight, this becomes an oversight matter that should be raised outside any supervisory meeting.

## 2 Implementation

### 2.1 Pilot Structure

- 2.1.1 Each pilot project will be asked to select a pattern of supervision from the following options:



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- All supervisees to be supervised by their minister in oversight/manager.
  - All supervisees to be supervised by their minister in oversight/manager or a nominated alternate.
  - All supervisees to be supervised by someone who has no oversight responsibility for their work.
- 2.1.2 Each pilot project shall appoint a local pilot coordinator.
- 2.2 Pilot Coordinator Responsibilities**
- 2.2.1 Decide, in consultation with GBHEM and local leadership, and within the bounds of this policy, how supervision shall operate within the pilot context to meet local needs and provide research data to GBHEM.
- 2.2.2 Nominate appropriate people to be trained as supervisors and match trained and approved supervisors with supervisees. Both lay and ordained people may be nominated as supervisors. The minister in oversight should be content with the arrangements.
- 2.2.3 Ensure that third parties are in place where needed.
- 2.2.4 Ensure that all supervisors, supervisees, third parties, and ministers in oversight are kept appropriately briefed during the project
- 2.2.5 Maintain an updated pilot plan and track progress of the pilot project.
- 2.3 Supervisor training and approval**
- 2.3.1 GBHEM will train and approve all pilot project supervisors. The dispositions, skills, and knowledge of potential supervisors will be assessed and not everyone nominated will necessarily be approved to supervise.
- 2.3.2 All supervisors will be in supervision themselves for supervisory work.
- 2.3.3 The criteria for assessment and the process for approval are set out in Section 5 of the Training Notebook
- 2.3.4 Training records will be kept by GBHEM until the point of approval at which point all assessment forms will be destroyed.
- 2.4 Participant Files**
- 2.4.1 A participant file will be created for each person being supervised. This will contain:
- A completed Supervision Covenant Form
  - Completed Agreed Records of each supervisory meeting
- 2.4.2 The participant file shall be kept confidentially by the supervisor and the minister in oversight/nominated third party according to local data protection law.
- 2.4.4 Nothing may be kept in the participant file that has not been seen by the supervisee.
- 2.4.5 The file may be subject to access requests and other legal processes.



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- 2.4.6 Any formal reports on the supervisory relationship, e.g. for the processes of training or appraisal, should be made on the basis of the information in the participant file. Supervisees shall have opportunity to comment on any report made and should sign the report to indicate that they have seen it.

### 2.5 Agreed Records

- 2.5.1 Agreed Records shall be kept by the supervisor and shared with a third party following each supervisory meeting. If the overseeing minister is not the reflective supervisor, that person should be the third party nominated to receive the Agreed Record. If the overseeing minister is the reflective supervisor, an appropriate third party should be nominated to receive the Agreed Record. An appropriate third party is someone who is able to help the supervisor reflect on their supervisory practice.
- 2.5.2 No one may supervise or receive Agreed Records for anyone with whom they are in a close personal relationship (e.g., spouse or child/parent).
- 2.5.3 Agreed Records should only contain the information necessary for oversight responsibilities to be exercised.
- 2.5.4 Anything on the Agreed Record can be appropriately raised by the minister in oversight with the supervisee outside of the supervision context.
- 2.5.5 Nothing should be written on the Agreed Record that could identify a third party.
- 2.5.6 Beyond those matters recorded on the Agreed Record supervision is confidential to the supervisor and the supervisee concerned except that the supervisor is expected to take issues arising to their own supervisor for reflection. This is a safeguard for all concerned and does not require the disclosure of names or places.
- 2.5.7 At the end of the pilot period supervisors and overseeing ministers/third parties should hand their participant files to the supervisee or ensure they are destroyed.

## 3 Roles and Responsibilities

- 3.1.1 The roles and responsibilities of supervisors, supervisees, and nominated third parties are set out Section 5 of the Training Notebook.
- 3.2.1 GBHEM will appoint a liaison officer to
- consult on the model of supervision implemented
  - provide access to appropriate training and briefing for pilot participants, including supervisors and supervisees
  - troubleshoot in matters of implementation
  - help interpret the prototype policy
  - gather research data



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### 4 General Guidelines and FAQs

#### 4.1 Supervisory Meetings

- 4.1.1 Supervisory meetings should normally take place six (6) times each year and last 90 minutes.
- 4.1.2 Supervisors will need to brief new supervisees on the nature of the supervisory relationship and the purpose of the pilot. They will need to complete a Supervision Covenant Form with their supervisee and copy this to the nominated third party.
- 4.1.3 Supervisions may be conducted face to face or by virtual means, such as Zoom.
- 4.1.4 All supervisions should be conducted in confidential space, free from interruptions. The use of electronic means requires both parties to think carefully about how to protect the space and time from other distractions.
- 4.1.5 Dates and venues for supervisions should be agreed upon in advance.
- 4.1.6 Supervisory meetings should be treated as priority commitments and except in emergencies should only be changed by mutual consent.
- 4.1.7 It is usual for the supervisee to travel to the supervisor.
- 4.1.8 At the conclusion of each supervision an Agreed Record Form should be completed and signed by the supervisor and supervisee. Copies should be kept by both parties with an additional copy sent to the minister in oversight/nominated third party for their reference.
- 4.1.9 Supervisors and supervisees may wish to keep more detailed notes for their personal reference. These may be subject to legal access requests.

#### 4.2 Addressing Problems

- 4.2.1 If a supervisee is unhappy with the supervision being offered that person should first discuss the matter with their supervisor and secondly with those responsible for the pilot in which they are participating.
- 4.2.2 In cases where the matter cannot be resolved locally, the GBHEM-appointed officer should be contacted.
- 4.2.3 Feedback on this Prototype Policy and permission to vary its terms should be addressed to the GBHEM-appointed officer.

#### 4.3 Contribution to Research

- 4.3.1 All pilot project participants will be asked to provide feedback on their experiences of this Prototype Policy and of their experience with reflective supervision.
- 4.3.2 All responses will be anonymised.
- 4.3.3 Written consent will be required from participants for any verbatim contributions to be published.





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- 4.4 Electronic copies of the following documents are available at: [www.bomlibrary.org](http://www.bomlibrary.org) (Reflective Supervision section)
- Supervision Covenant Form
  - Agreed Record Form
  - Role of the Reflective Supervisee
  - Role of the Reflective Supervisor
  - Role of the Third Party Receiving Records
  - Role of the Manager/Overseeing Minister Receiving Records

### References:

- Leach, J. (2020). *A Charge to Keep: Reflective Supervision and the Renewal of Christian Leadership*. Nashville: GBHEM.
- Leach, J. & Paterson, M. (2015). *Pastoral Supervision: A Handbook (Second Edition)*. London: SCM Press.
- The General Board of Higher Education & Ministry (2019). *Transformative Clergy Leaders: Effective Ministry 360™*.